



Our Company Story

Charter Oak Capital Management is a privately owned independent wealth management firm based in Portsmouth, New Hampshire, Kennebunk and Portland, Maine. We help our clients achieve success by identifying their goals and developing investment and financial planning strategies designed to achieve them.

About Charter Oak Capital Management



Our Financial Planning Process



Our Financial Planning Process

As a fiduciary, we place your interests before ours and work to develop a financial plan that will work for your unique goals and needs. We adhere to our **"7 Promises"** for every single one of our client relationships.

We listen, learn and help.



Our 7 Promises



CHARTER OAK
CAPITAL MANAGEMENT
Registered Investment Advisors

Our Team



Our Locations

Our staff consists of experienced professionals with a "hands on" approach to financial guidance. Not only will you find our team members knowledgeable, but you will also discover that our staff truly cares about helping to make your dreams a reality. As your wealth management team, we will do everything in our power to keep you focused on where you want to go, advise you on how to get there, and continually remind you of the importance of maintaining a disciplined approach to realizing your goals... and chat about a great game or check in to talk about your island vacation!



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[Our seven promises to you](#)

[Our team](#)

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CONTACT US

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LOCATIONS

[Portland, ME](#)

[Kennebunk, ME](#)

[Portsmouth, NH](#)

